



Guardian ad Litem – 2nd Judicial District Court of Minnesota Monthly Activity Report

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Instructions to Volunteer

How to Complete this Form

This form is required to submit monthly activity reports for volunteers of the Guardian ad Litem program of the Minnesota Judicial Branch. It must include all activities (e.g., court hearings, consultation with Guardian ad Litem staff and others, interviews, case records review, paperwork, etc.) and time spent in person or by phone (5 minute minimum on messages left). Once this form is submitted, it will be reviewed by a coordinator. After you complete this form, please complete the Mileage Claim form as applicable. **This form must be completed before the Mileage Claim form.** You will need your Vendor ID and Password to complete this form.

1. To open the form, click either **Download to Filler** or **View with iFiller**. For help on which one to use, see Helpful Hints When Completing Form, below.
OR
2. Open the form that was attached to the email.
3. Complete this entire form as indicated in the detailed instructions, below. Incorrectly completed forms will be returned. Simply tab through the form to complete it. This form contains 3 pages; use the buttons available at the top or bottom of the form to page through it.

This form must be completed and submitted by the 5th of the month.

Helpful Hints When Completing Form

To make this form easier to complete, download the Formatta Filler: http://www.formatta.com/page_Downloads/Products.html. Simply follow the instructions for downloading. Once downloaded, you have more options available to you. Formatta Filler:

- Provides scroll bars rather than just the hand to move the form around.
- Shows data as it is entered into fields rather than just showing it in the upper blue box.
- Allows for easy saving.

Detailed Instructions

Top Portion of Page 1. Identifying Information

1. Upon opening the form, you must add some basic user information. To easily add this information, in the top-right corner of the form, simply click **Login/Autofill**. An Autofill dialog appears.
Note: This process will automatically pull information from your User Setup form into the applicable fields of this form.
2. Enter your Vendor ID and Password, and click **Submit**. A confirmation message appears.
3. Click **OK**. The information is now populated within the form.
Note: If you need to make changes to the information, at the top of the form, click the **Update** checkbox. Then simply click into the applicable field to make changes.

Bottom Portion of Page 1: Monthly Activity

- **Case #.** For existing cases, select the case number from the drop-down menu. For a new case, enter the case number using the following format: 00-00-00-000000.
- **Case Name.** This field can be populated with the applicable case name by clicking **Populate Case Name**. For a new case, type in the case name. To clear the entry, click **Clear**.
- **Number of Children.** Provide the number of children involved in the case.

- **Month.** From the drop-down menu, select the reporting month.
- **Year.** From the drop-down menu, select the year.
- **Date.** Provide the date of the activity. Select the date from the calendar or type it in the field in the following format using numbers only; no dashes or hyphens needed: MMDDYYYY.
- **Activity.** From the drop-down menu, select the activity.
- **Activity Description.** Provide a description only if activity isn't listed or needs more description.
- **In Person or By Phone.** Select the applicable checkbox.
- **In-Person Child Contacts.** Provide the number of contacts involved in the activity. Count 1 contact for each child in the family that you see.
- **Time (In Minutes).** Provide the minutes spent on activity.
- **Total Time (Hours).** This field is automatically calculated based on the time entered in the Time (In Minutes) field.

Last Page of Form. Approval

At the top of Page 3, it provides an overview of the Total In-Person Child Contacts and the Total Time spent.

- **Activities for next month.** In these fields, provide intended activities.
- **Next Court Date.** Provide the next court date for this case. Select the date from the calendar or type it in the field in the following format using numbers only; no dashes or hyphens needed: MMDDYYYY.

How to Submit this Form

After you have completed and reviewed the form:

1. To submit the form, on page 3 click **Sign/Submit**. An Authentication Required dialog appears.

OR

If you've been asked to re-submit the form, on page 3 select the **Re-Submission** checkbox, and then click **Sign/Submit**. An Authentication Required dialog appears.

Note: If you have not completed the form as detailed above, error messages will appear directing you to fix the error.

2. Provide your Username and Password, and click **Submit**. You will be immediately notified by email of its submission.
 - If using iFiller, to save the completed form, on the top toolbar click **Download as PFF** (the paper with the red arrow icon) or **Download as TIFF** (the paper with no arrow) and follow the prompts. Navigate to a location on your computer to save it.
 - If using the Formatta Filler (that you downloaded), a dialog appears indicating that the submission was successful. Click **OK**. A Save As dialog appears. Navigate to a location on your computer to save the form. It will be saved as a PFF file.
3. Close the form.

How to Check Form Status

To check the status of the form, open any previously submitted and saved form. At the top of the form on the right side, click the **Status** button. A Business Process Information dialog will appear with details on the form's status.

If the Form Gets Rejected

If the form gets rejected by your GAL Coordinator, you will get notified. Before you may re-submit it, you must follow these steps:

1. To start the process, open the form that was attached to the email. On the last page, click **Unsign**. A confirmation message appears.
2. Click **Yes**. Your signature disappears.
3. Make the requested changes to the form, as indicated in the email from your coordinator.
4. For details on re-submitting, refer to the instructions in How to Submit this Form.

Need Help?

If you have specific questions or need assistance completing this form, please contact your coordinator.

Instructions to GAL Coordinator

How to Review this Form

This form is required to submit monthly activity for volunteers of the Guardian ad Litem program of the Minnesota Judicial Branch. It must include all activities (e.g., court hearings, consultation with Guardian ad Litem staff and others, interviews, case records review, paperwork, etc.) and time spent in person or by phone (5 minute minimum on messages left). It must be completed and submitted by the 5th of the month. After this form is completed and submitted by the volunteer, it must be reviewed and approved by a coordinator. You will need your Vendor ID and Password to complete this form.

1. To open the form, click either **Download to Filler** or **View with iFiller**. For help on which one to use, see Helpful Hints When Completing Form, below.
OR
2. Open the form that was attached to the email.
3. Review this entire form as indicated in the detailed instructions, below. Incorrectly completed forms must be returned to the volunteer. Simply page through the form to review it. This form contains 3 pages; use the buttons available at the top or bottom of the form to page through it

Helpful Hints When Reviewing Form

To make this form easier to complete, download the Formatta Filler: http://www.formatta.com/page_Downloads/Products.html. Simply follow the instructions for downloading. Once downloaded, you have more options available to you. Formatta Filler:

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Detailed Instructions

Top Portion of Page 1. Volunteer Information

Review the volunteer's contact information and verify that it is correct (e.g., mailing address, phone, and email).

Bottom Portion of Page 1. Monthly Activity

Review all detail and verify that the monthly reporting of activities are correct.

Last Page of Form. Approval

Review all detail for any errors.

How to Submit this Form

After you have reviewed the completed form:

1. On page 3, select the checkbox for **Approved** or **Rejected**.
2. If rejecting the form, in the Reasons/Comments field, provide information on your reasons. This information will be provided in the email back to the volunteer and will assist him/her in correcting the form.
3. To submit the form, click **Sign/Submit**. An Authentication Required dialog appears.
OR
To re-submit the form, select the **Re-Submission** checkbox, and then click **Sign/Submit**. An Authentication Required dialog appears.
4. Provide your Username and Password, and click **Submit**. You will be immediately notified by email of its submission.
 - If using iFiller, to save the completed form, on the top toolbar click **Download as PFF** (the paper with the red arrow icon) or **Download as TIFF** (the paper with no arrow) and follow the prompts. Navigate to a location on your computer to save it.
 - If using the Formatta Filler (that you downloaded), a dialog appears indicating that the submission was successful. Click **OK**. The form is automatically saved; you do not need to save it.
5. Close the form.

How to Unsign this Form

If a form is rejected, each user that had previously signed/approved the form must unsign it before it can be fixed or approved again. For example, if you have previously rejected the form, the volunteer must unsign, make corrections, and resign, and then you must unsign the form and resign it.

1. Once you have received notification that the form has been corrected by the volunteer, open the form. On the last page,

click **Unsign**. A confirmation message appears.

2. Click **Yes**. Your signature disappears.
3. Review the form again. Refer to the Detailed Instructions.
4. For details on re-submitting, refer to the instructions in How to Submit this Form.

Need Help?

If you have specific questions or need any assistance regarding the process for completing this form, please submit your question, name, email, and phone number via Service Desk ticket. Someone will get back to you.